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TOURISM MARKET RESEARCH ON THE ARMENIAN-AMERICAN DIASPORA COMMUNITY

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I. INTRODUCTION

This report addresses research conducted by Menlo Consulting Group (MCG) on behalf of the Competitive Armenian Private Sector Project (CAPS). The research was conducted to understand the Armenian-American Diaspora community's perceptions of and motivations to visit Armenia, in order to increase visitation to the country.

STUDY OBJECTIVES

The objectives of the study were to understand the perceptions of Armenia by Armenian-Americans, as well as to explore their travel behaviors and preferences and determine how best to reach them and encourage them to visit to Armenia. Specific objectives were to:

- ❑ Profile members of the Armenian-American Diaspora community.
- ❑ Measure their awareness of tourism opportunities in Armenia and their perceptions and expectations of the country.
- ❑ Document their past travel experience, including past travel to Armenia, and their travel preferences.
- ❑ Quantify their interest in visiting or revisiting Armenia.
- ❑ Identify the best means of reaching and communicating Armenia's message to potential travelers.

RESEARCH APPROACH

To meet the above objectives, MCG conducted a quantitative telephone survey of 600 Armenian-Americans. All respondents were of Armenian descent and over the age of 18. Since the Armenian-American Diaspora community is highly concentrated in a small number of geographic locations in the United States, the survey was focused in the five U.S. states (California, Massachusetts, New York, New Jersey, and Michigan) that have the largest resident populations of Armenians, according to the U.S. Census Bureau 2005 American Community Survey.¹ According to the U.S. census data, these five states account for almost 8 in 10 of all Armenian-Americans who reside in the United States (Exhibit 1).²

¹ Based on reported ancestry.

² Florida, Illinois, Pennsylvania, and Connecticut also have relatively sizable communities of Armenians; however, these four states combined account for less than 10% of the total Armenian-American Diaspora population.

EXHIBIT 1. TOP U.S. STATES FOR ARMENIAN-AMERICANS

California	56.9%
Massachusetts	7.1%
New York	5.5%
New Jersey	4.0%
Michigan	3.4%
Florida	2.6%
Illinois	2.5%
Pennsylvania	1.9%
Connecticut	1.8%

Source: 2005 American Community Survey, U.S. Census Bureau.

The survey was conducted with a disproportionate sampling methodology; that is, 120 interviews were completed in each of the five target states. The sample was drawn from Experian Marketing Solutions' Ethnic INSOURCE Database. A disproportionate sample methodology was chosen because it allowed for independent analysis of each of the five states. The final data were weighted so that the full sample (600 completes) is proportional to the distribution of the Armenian-American Diaspora population in the five states surveyed. The maximum margin of error is $\pm 4\%$ at the 95% confidence level for the total sample, and $\pm 9\%$ for each state.

The survey was conducted in January 2007 and had an average length of 16 minutes. The questionnaire consisted primarily of closed-format questions and was conducted in English during weekday evenings and on weekends. No incentive was offered. A copy of the questionnaire is contained in Appendix A.

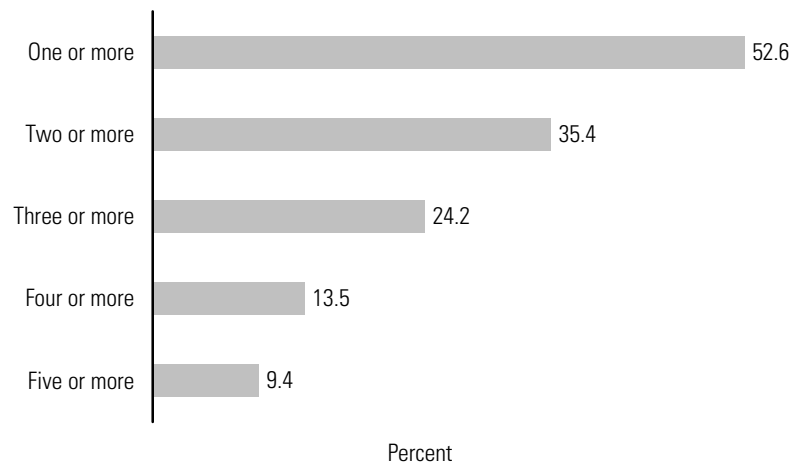
A pilot test of the final draft questionnaire was conducted to ensure that the survey instrument was clear and unambiguous and that it elicited appropriate findings from the target audience. The pilot test was conducted with a small sample of Armenian-Americans in California. Based on the pilot test, some minor revisions were made to the questionnaire.

II. TRAVEL EXPERIENCE, INTEREST, AND INTENTIONS

TRAVEL EXPERIENCE

Armenian-Americans are well traveled. More than half (52.6%) of all Armenian-Americans took one or more international trips for leisure or to visit friends or relatives (VFR) in the past five years (Exhibit 2). More than one-third (35.4%) took two or more international trips, and 9.4% took five or more trips.

EXHIBIT 2. FREQUENCY OF INTERNATIONAL TRIPS FOR LEISURE OR TO VISIT FRIENDS OR RELATIVES IN THE PAST FIVE YEARS



Armenian-Americans who live in New York have the highest incidence of international travel; 60.0% traveled internationally in the past five years. California (54.6%), New Jersey (49.6%), Michigan (39.2%), and Massachusetts (38.1%) follow. Most are ready to travel again; 77.3% hold a valid passport. Passport ownership is highest in New York (82.4%) and California (80.7%), followed by New Jersey (69.7%), Massachusetts (58.8%), and Michigan (57.0%).

Armenian-Americans tend to favor Europe for their international trips. Nearly a third (31.8%) of all Armenian-Americans—60.1% of those who had traveled internationally—went to Europe at least once in the past five years (Exhibit 3). More than 1 in 10 visited the Middle East or Caucasus (15.1%), Mexico (11.9%), or the Caribbean (10.5%).

Half (49.5%)³ of all Armenian-Americans have been to Armenia previously. Those who reside in California are the most likely to have been to Armenia previously (56.7%). Those who reside in New York (40.8%), New Jersey (33.3%), Michigan (21.7%), and Massachusetts (20.8%) are less likely to have been to Armenia previously.

³ This number includes respondents who were born in Armenia but may not have otherwise visited the country.

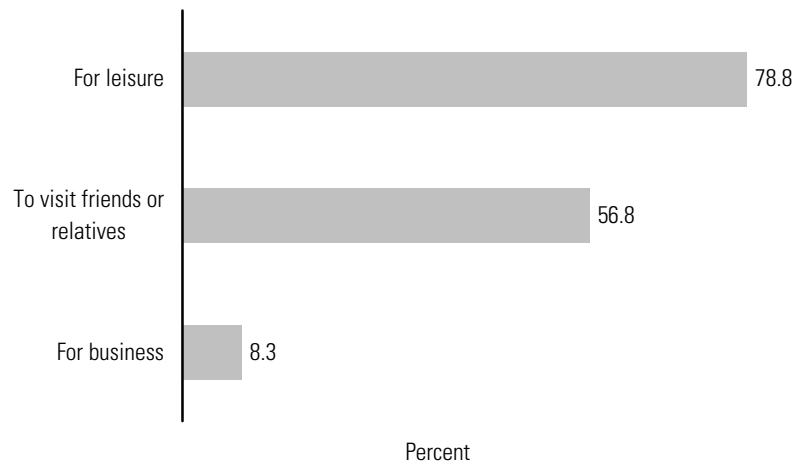
EXHIBIT 3. DESTINATIONS VISITED FOR LEISURE OR TO VISIT FRIENDS OR RELATIVES IN THE PAST FIVE YEARS

	All Armenian- Americans	Armenian-Americans Who Took an International Trip*
Europe	31.8%	60.1%
The Middle East or Caucasus	15.1	28.5
Mexico	11.9	22.5
The Caribbean	10.5	19.8
Canada	8.9	16.7
Asia	5.6	10.6
Central or South America	3.7	7.1
The South Pacific (including Australia and New Zealand)	1.1	2.1
Africa	0.6	1.1
Somewhere else	1.6	3.1
(Number of respondents)	(600)	(317)

* For leisure or VFR.

Three in 10 (29.5%) of all Armenian-Americans—59.7% of those who have visited Armenia previously—have been there in the past five years. Most of these *recent visitors* (61.7%) visited Armenia only once in the past five years; 21.4% did so two times, 7.5% three times, 4.3% four times, and 5.1% five or more times. The vast majority of those who have visited in the past five years did so for leisure or to visit friends or relatives; fewer than 1 in 10 visited for business (Exhibit 4).

EXHIBIT 4. REASONS ARMENIAN-AMERICANS VISITED ARMENIA IN THE PAST FIVE YEARS (AMONG THOSE WHO VISITED ARMENIA IN THE PAST FIVE YEARS)



Almost half (49.2%) of those who visited Armenia for leisure or to visit friends or relatives in the past five years took their most recent trip there in 2005 or 2006 (Exhibit 5).

EXHIBIT 5. YEAR IN WHICH MOST RECENT TRIP TO ARMENIA BEGAN
(AMONG THOSE WHO VISITED ARMENIA FOR LEISURE OR VFR IN THE PAST FIVE YEARS)

2006	23.6%
2005	25.6
2004	14.6
2003	18.3
2002	17.9

(Number of respondents = 148)

INTEREST IN VISITING ARMENIA

The vast majority (86.1%) of all Armenian-Americans are interested in visiting or revisiting Armenia; 62.5% are extremely or very interested (Exhibit 6). Interest is highest among those who have been to Armenia. For example, 80.8% of those who have visited Armenia in the past five years say they are extremely or very interested in visiting. In comparison, only 48.2% of those who have never been to Armenia express comparable interest.

EXHIBIT 6. INTEREST IN VISITING OR REVISITING ARMENIA

	All Armenian- Americans	Ever Been to Armenia	Recent Visitors	Never Been to Armenia
Extremely	37.3%	53.3%	54.7%	21.7%
Very much	25.2	24.0	26.1	26.5
Somewhat	23.6	17.8	14.9	29.3
Not very much	6.7	1.8		11.5
Not at all	7.2	3.2	4.3	11.1
(Number of respondents)	(599)	(297)	(177)	(302)

Interest in visiting Armenia is highest among Armenian-Americans who reside in California; 66.7% say they are extremely or very interested in visiting or revisiting Armenia. New York (55.9%), New Jersey (54.2%), Michigan (49.6%), and Massachusetts (45.4%) follow.

TIME HORIZON FOR VISITING ARMENIA

Intentions to visit Armenia are also high. Nearly two-thirds (65.7%) of all Armenian-Americans say they are likely to travel to Armenia in the next five years (Exhibit 7). Armenian-Americans who have previously been to Armenia are the most likely to return. For example, 82.3% of recent

visitors say they are likely to return to Armenia in the next five years. In comparison, only 48.1% of those who have never visited Armenia say they are likely to visit in the next five years. Nevertheless, only one in six of those who have not yet been to Armenia say they are never likely to visit. Among Armenian-Americans who are extremely or very interested in visiting Armenia, 83.8% are likely to do so in the next five years.

EXHIBIT 7. WHEN ARMENIAN-AMERICANS ARE LIKELY TO VISIT ARMENIA

	All Armenian- Americans	Ever Been to Armenia	Recent Visitors	Never Been to Armenia	Those Extremely or Very Interested in Visiting Armenia
Next 2 years	34.4%	53.1%	58.6%	16.0%	46.1%
Next 3 to 5 years	31.3	30.5	23.7	32.1	37.7
More than 5 years from now	24.5	13.6	14.4	35.3	15.1
Never	9.8	2.9	3.2	16.6	1.2
(Number of respondents)	(576)	(286)	(168)	(290)	(361)

As with interest, Armenian-Americans who reside in California have the highest intentions to visit Armenia; 71.6% are likely to visit in the next five years and 38.8% in the next two years (Exhibit 8). New York, New Jersey, Michigan, and Massachusetts follow.

EXHIBIT 8. WHEN ARMENIAN-AMERICANS ARE LIKELY TO VISIT ARMENIA—BY STATE

	California	Massachusetts	Michigan	New Jersey	New York
Next 2 years	38.8%	18.6%	21.1%	26.7%	21.9%
Next 3 to 5 years	32.8	23.0	22.9	25.9	35.1
More than 5 years from now	23.3	28.3	31.2	27.6	26.3
Never	5.2	30.1	24.8	19.8	16.7
(Number of respondents)	(116)	(113)	(109)	(116)	(114)

TARGET TRAVELERS FOR ARMENIA

We believe that Armenian-Americans who say they are extremely or very interested in visiting or revisiting Armenia and say they are likely to do so in the next five years represent the best prospects within the Armenian-American community for CAPS. This segment accounts for 52.4% of all Armenian-Americans. Throughout this report, we refer to them as *target travelers*.

Target travelers are more likely than other Armenian-Americans to have been to Armenia previously; 66.9% have been there at some stage during their lives, compared with 31.8% of other Armenian-Americans. Four in 10 (40.4%) have visited in the past five years, compared with only 18.5% of other Armenian-Americans.

III. PROFILE OF ARMENIAN-AMERICANS

The majority of Armenian-Americans live in California, which accounts for 74.0% of all Armenians living in the five survey states. Massachusetts, New York, New Jersey, and Michigan each account for fewer than 1 in 10 (Exhibit 9). Similarly, the vast majority of Armenian-Americans who have been to Armenia are from California; more than 8 in 10 of those who have ever been or have visited in the past five years reside in California. Target travelers are also most likely to reside in California; 80.9% of target travelers are from the Golden State.

EXHIBIT 9. GEOGRAPHIC PROFILE OF ARMENIAN-AMERICANS

	All Armenian- Americans	Ever Been to Armenia	Recent Visitors	Never Been to Armenia	Target Travelers
California	74.0%	84.8%	85.7%	63.5%	80.9%
Massachusetts	9.2	3.9	3.4	14.5	5.6
New York	7.2	5.9	5.9	8.4	6.3
New Jersey	5.2	3.5	3.2	6.8	4.5
Michigan	4.4	1.9	1.9	6.8	2.7
(Number of respondents)	(600)	(297)	(177)	(303)	(302)

Armenian-Americans are well educated. Six in 10 (59.3%) are college graduates, compared with only 25.2% of all American adults (Exhibit 10). More than one-quarter (27.0%) have attended or completed graduate school; 14.6% hold a master's degree and 5.0% a doctorate. Target travelers have similar levels of educational attainment as all Armenian-Americans.

EXHIBIT 10. EDUCATION PROFILE OF ARMENIAN-AMERICANS

	All Armenian- Americans	Ever Been to Armenia	Recent Visitors	Never Been to Armenia	Target Travelers	U.S. Adult Population
Attended or completed graduate school	27.0%	23.9%	29.0%	30.2%	25.0%	8.4%
Completed doctorate	5.0	3.6	5.1	6.5	3.7	-
Completed master's degree	14.6	13.0	15.8	16.2	12.4	-
Attended graduate school	7.4	7.3	8.1	7.5	8.9	-
College graduate (4 years)	32.3	31.9	39.4	32.7	34.1	16.8
1 to 3 years of college	22.1	23.4	19.0	20.7	26.2	27.2
High school or less	18.5	20.7	12.6	16.3	14.7	47.6
(Number of respondents)	(584)	(296)	(177)	(288)	(301)	

Sources: 2007 Armenian-American Diaspora Survey;
February 2005, Supplement to the Current Population Survey (CPS), U.S. Census Bureau.

Broadly speaking, the age distribution of Armenian-Americans mirrors that of U.S. adults as a whole (Exhibit 11). Armenian-Americans who have been to Armenia are somewhat younger than Armenian-Americans as a whole. For example, 65.7% of recent visitors are under 45 years of age, compared with 52.6% of all Armenian-Americans. Target travelers also tend to be younger; 42.1% are under age 35, compared with 30.8% of all Armenian-Americans. Nearly one-third (31.5%) of all Armenian-Americans have children under 18 living with them.

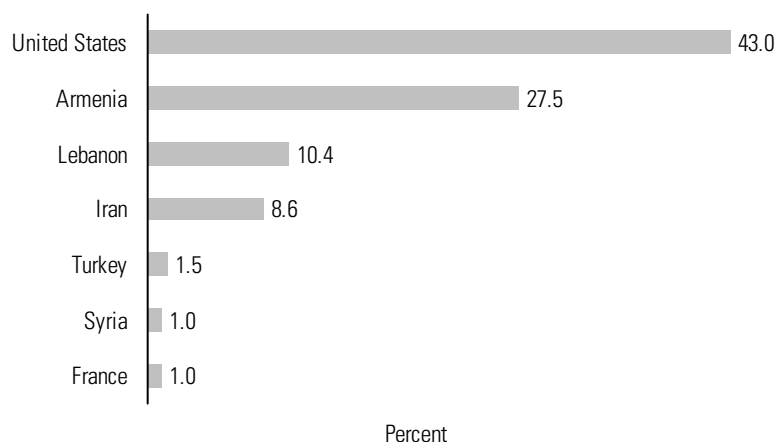
EXHIBIT 11. AGE PROFILE OF ARMENIAN-AMERICANS

	All Armenian- Americans	Ever Been to Armenia	Recent Visitors	Never Been to Armenia	Target Travelers	U.S. Adult Population
75 or older	5.7%	2.7%	2.3%	8.8%	2.5%	7.7%
65 to 74	10.4	8.3	10.3	12.6	6.2	8.5
55 to 64	10.8	3.0	3.1	18.8	8.6	13.2
45 to 54	20.4	16.4	18.5	24.3	18.8	19.1
35 to 44	21.8	25.2	23.8	18.4	21.9	20.3
18 to 34	30.8	44.3	41.9	17.1	42.1	31.2
(Number of respondents)	(589)	(297)	(177)	(292)	(302)	

Sources: 2007 Armenian-American Diaspora Survey;
February 2005, Supplement to the Current Population Survey (CPS), U.S. Census Bureau.

About four in nine Armenian-Americans (43.0%) were born in the United States (Exhibit 12). More than one-quarter (27.5%) of all Armenian-Americans were born in Armenia; fewer were born in Lebanon, Iran, Turkey, Syria, or France.⁴

EXHIBIT 12. TOP COUNTRIES IN WHICH RESPONDENTS WERE BORN



⁴ Other countries in which respondents were born included Russia, Egypt, Romania, Israel, Canada, Iraq, Bulgaria, Georgia, Jordan, and Azerbaijan. Each of these countries was mentioned by fewer than 1% of respondents.

The majority of Armenians who immigrated to the United States did so relatively recently. Three-quarters (75.7%) of those who were born outside the United States immigrated to the United States since 1980; 37.4% did so since 1990 (Exhibit 13).

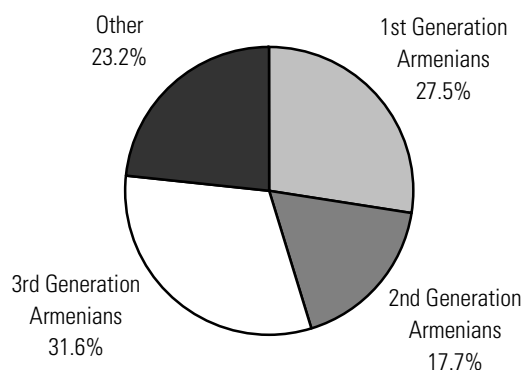
EXHIBIT 13. DECADE IN WHICH THOSE BORN OUTSIDE THE UNITED STATES IMMIGRATED TO THE UNITED STATES

2000s	8.2%
1990s	29.2
1980s	38.3
1970s	13.4
1960s	6.1
1950s	4.3
Prior to 1950	0.4

(Number of respondents = 321)

More than 6 in 10 Armenian-Americans (61.8%) say that one or more of their grandparents were born in Armenia; 35.4% say that one or both of their parents were born in Armenia. In fact, 76.8% of all Armenian-Americans are either first, second, or third generation Armenians (Exhibit 14). Three in 10 (31.6%) are third generation Armenians; that is, one or more of their grandparents were born in Armenia. About one in six are second generation Armenians; that is, one or both of their parents were born in Armenia. As noted earlier, 27.5% are first generation Armenians; that is, they themselves were born in Armenia.

EXHIBIT 14. GENERATIONAL PROXIMITY TO ARMENIA



California has, by far, the highest proportion of Armenian-Americans who were born in Armenia: 34.7% are first generation Armenians (Exhibit 15). Very few (1.8%) of Michigan's Armenians were born in Armenia. Massachusetts and Michigan have the highest proportions of

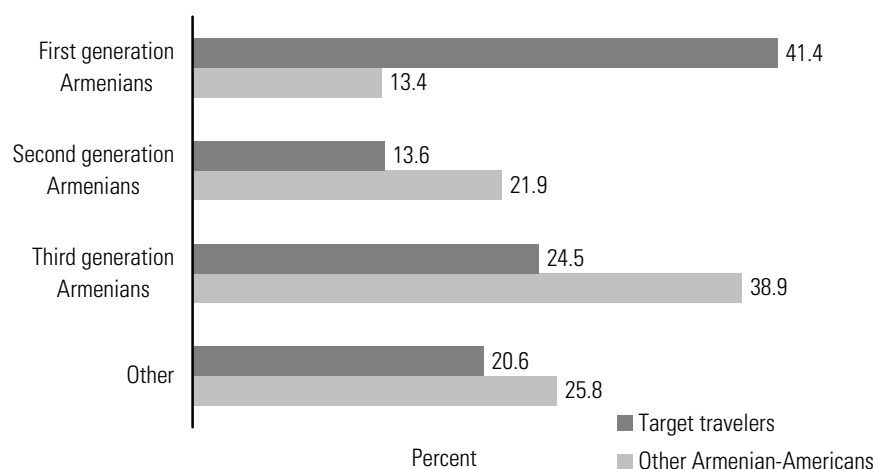
those who are second (31.6% and 23.7%, respectively) and third (43.9% and 48.2%, respectively) generation Armenians.

EXHIBIT 15. GENERATIONAL PROXIMITY TO ARMENIA—BY STATE

	California	Massachusetts	Michigan	New Jersey	New York
First generation Armenians	34.7%	3.5%	1.8%	6.8%	12.8%
Second generation Armenians	15.3	31.6	23.7	18.6	21.4
Third generation Armenians	28.8	43.9	48.2	35.6	32.5
Other	21.2	21.1	26.3	39.0	33.3
(Number of respondents)	(118)	(114)	(114)	(118)	(117)

Target travelers are substantially more likely than other Armenian-Americans to be first generation Armenians. Indeed, 41.4% of all target travelers are first generation Armenians, compared with only 13.4% of other Armenian-Americans (Exhibit 16). Conversely, target travelers are much less likely to be third generation Armenians; only 24.5% of target travelers are third generation, compared with 38.9% of other Armenian-Americans.

EXHIBIT 16. GENERATIONAL PROXIMITY TO ARMENIA



Armenian is quite widely spoken among Armenian-Americans. Although fewer than 3 in 10 respondents were born in Armenia, nearly three-quarters (73.8%) speak Armenian; 52.7% speak Western Armenian and 42.9% speak Eastern Armenian. One-fifth (19.5%) speak Russian. Target travelers are especially likely to speak Armenian. Nine in 10 target travelers (89.0%) speak Armenian; 66.7% speak Western Armenian and 54.6% speak Eastern Armenian. Nearly 3 in 10 target travelers (28.4%) speak Russian.

TRAVEL CHARACTERISTICS

TRIP LENGTH

Among those who visited Armenia for leisure or VFR in the past five years, the majority (64.2%) were away from home for between 8 and 21 nights. A sizable number were away from home for more than four weeks (22.4%), while fewer than 1 in 10 (8.2%) stayed one week or less (Exhibit 17). Among recent leisure/VFR visitors, most would take a similar length trip in the future; some would stay a little longer.

EXHIBIT 17. ACTUAL AND PROJECTED NUMBER OF NIGHTS AWAY FROM HOME WHEN VISITING ARMENIA

	Armenian-Americans Who Visited Armenia for Leisure or VFR in the Past Five Years		Target Travelers	Other Armenian-Americans*
	Length of Most Recent Trip to Armenia	Projected Length for a Future Trip to Armenia	Projected Length for a Future Trip to Armenia	Projected Length for a Future Trip to Armenia
1 to 7 nights	8.2%	5.3%	5.0%	22.3%
8 to 14 nights	29.1	25.8	34.9	45.1
15 to 21 nights	35.1	22.2	18.6	17.8
22 to 28 nights	5.2	12.5	10.6	2.1
29 or more nights	22.4	34.3	30.8	12.7
(Number of respondents)	(153)	(157)	(301)	(272)

* Armenian-Americans who are not target travelers.

Among target travelers, 34.9% say they would travel for 8 to 14 nights; only 5.0% would stay away one week or less. Target travelers are much more likely than other Armenian-Americans to say they would stay away for 29 or more nights; 30.8% of target travelers would do so, compared with only 12.7% of other Armenian-Americans.

LODGING

The majority (71.4%) of those who visited Armenia for leisure or VFR in the past five years stayed in either a hotel or with relatives during their trip (Exhibit 18). About one in seven (15.1%) stayed in their own property, and 12.4% stayed in a rented apartment.

Hotels and relatives also lead the list of accommodations that recent travelers would stay in on a future trip to Armenia. However, about twice as many say they would stay in their own property, perhaps suggesting that these travelers purchased property on their recent trip to Armenia. Target travelers also favor staying in hotels when visiting Armenia; 63.6% say they would do so. Target travelers are much more inclined to say they would stay in a hotel, compared with recent

leisure/VFR visitors, perhaps indicating a lack of knowledge about the various accommodation options available in Armenia.

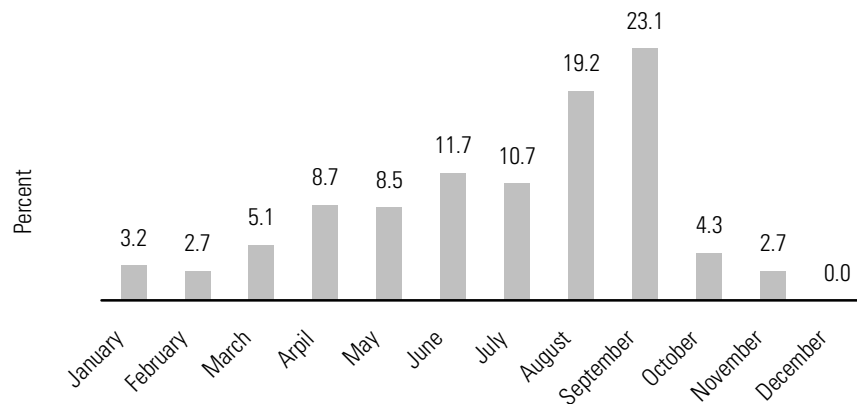
EXHIBIT 18. ACTUAL AND PREFERRED LODGING WHEN VISITING ARMENIA

	Armenian-Americans Who Visited Armenia for Leisure or VFR in the Past Five Years		Target Travelers	Other Armenian-Americans
	Lodging Used on Most Recent Trip to Armenia	Lodging for a Future Trip to Armenia	Lodging for a Future Trip to Armenia	Lodging for a Future Trip to Armenia
Hotel	36.8%	53.6%	63.6%	76.3%
Relatives	34.6	40.9	28.8	15.1
Own property	15.1	27.3	17.4	4.1
Rented apartment	12.4	23.5	19.1	9.1
Friends	10.2	30.6	26.9	7.0
B&B or guest house	0.9	6.4	8.2	12.6
Hostel	0.0	2.7	3.4	5.1
None of these	0.0	0.0	0.0	0.6
(Number of respondents)	(161)	(161)	(302)	(288)

SEASONALITY

The vast majority (81.9%) of leisure and VFR travel by Armenian-Americans to Armenia occurs between April and September, with distinct peaks during August and September. Nearly one-fifth (19.2%) of Armenian-Americans who visited Armenia for leisure or VFR in the past five years say that their most recent trip began in August; 23.1% began their trip in September (Exhibit 19). June and July are also popular months to travel to Armenia; very few began their trip during the winter.

EXHIBIT 19. MONTH IN WHICH MOST RECENT LEISURE OR VFR TRIP TO ARMENIA BEGAN (AMONG THOSE WHO VISITED ARMENIA FOR LEISURE OR VFR IN THE PAST FIVE YEARS)



The largest proportion (43.8%) of all Armenian-Americans say that if they were to visit Armenia they would go in the summer (Exhibit 20). Almost as many (38.5%) would go in the spring. Recent visitors to Armenia are somewhat more likely to say they would go in the fall, while target travelers would opt for a summer vacation to Armenia. As with actual visitation patterns, very few say they would visit Armenia during winter.

EXHIBIT 20. TIMING OF A FUTURE TRIP TO ARMENIA

	All Armenian- Americans	Recent Visitors to Armenia	Target Travelers	Other Armenian- Americans
Spring	38.5%	32.2%	29.1%	49.6%
Summer	43.8	45.6	55.8	29.7
Fall	14.6	22.2	13.8	15.6
Winter	3.1	0.0	1.3	5.1
(Number of respondents)	(516)	(164)	(279)	(238)

IV. ATTITUDES AND TRAVEL INTERESTS

MOTIVATIONS

Armenian-Americans are motivated to visit Armenia for a variety of reasons, ancestral connections being chief among them. Nearly 9 in 10 (86.3%) say that seeing their ancestral homeland is extremely or somewhat important in motivating them to visit Armenia, and 83.4% say the same about exploring their ancestral heritage (Exhibit 21). These two ancestral factors particularly motivate Armenian-Americans born in Armenia; 99.3% and 94.9%, respectively, agree that these are important factors.

Many Armenian-Americans also feel a desire to give back to their homeland; 84.5% say a major motivating factor is to contribute to the development of Armenia. Past visitors to Armenia are more than twice as likely as those who have not been there to say that this is an extremely important factor (72.5% versus 32.0%).

All of these factors are deemed most important by Armenian-Americans born in Armenia and decrease in importance for second and third generation Armenians. Target travelers also place importance on seeing their ancestral homeland, contributing to the development of Armenia, and exploring their heritage. They are also more likely than other Armenian-Americans to say that conducting business or exploring business opportunities is an important motivating factor.

EXHIBIT 21. IMPORTANCE OF SELECTED FACTORS IN
MOTIVATING VISITATION TO ARMENIA
(EXTREMELY OR SOMEWHAT)

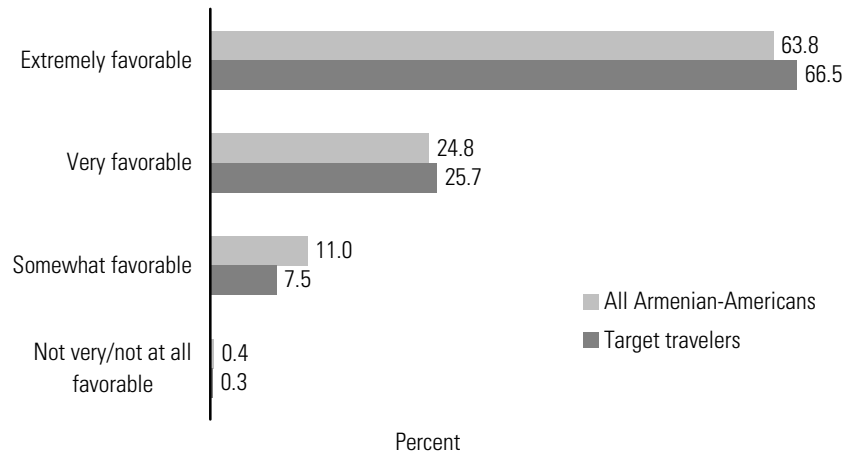
	All Armenian- Americans	Born in Armenia	Ever Been to Armenia	Never Been to Armenia	Target Travelers
To see ancestral homeland	86.3%	99.3%	93.6%	79.4%	97.2%
To contribute to the development of Armenia	84.5	97.4	95.0	74.1	96.9
To explore ancestral heritage	83.4	94.9	87.3	79.7	96.0
To visit friends or relatives	58.7	97.0	85.1	32.6	80.4
To conduct business or explore business opportunities	35.7	45.3	46.2	25.0	50.8
(Number of respondents)	(571-595)	(158-162)	(289-292)	(286-302)	(290-301)

ATTITUDES TOWARD ARMENIA

Most Armenian-Americans who visited Armenia for leisure or VFR in the past five years had an overall favorable impression of the country as a tourist destination; 88.6% say their impression was

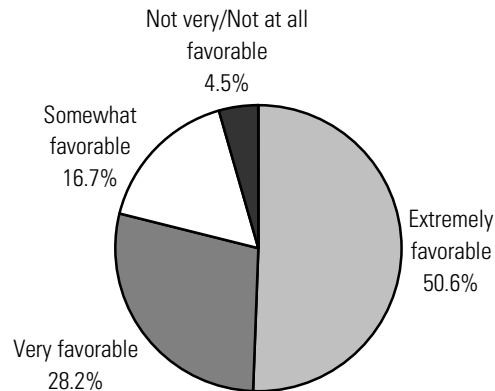
extremely or very favorable (Exhibit 22). Further, 66.1% say Armenia was better than they expected, while 31.3% say it was pretty much as expected. Among the 40.4% of target travelers who have recently been to Armenia, 92.2% say their impression of Armenia was extremely or very favorable, and 68.7% say it was better than they expected.

EXHIBIT 22. OVERALL IMPRESSION OF ARMENIA AS A TOURIST DESTINATION
(AMONG THOSE WHO VISITED FOR LEISURE OR VFR IN THE PAST FIVE YEARS)



Armenian-Americans are generally receiving positive feedback about Armenia as a tourist destination from people they know who have recently visited the country (Exhibit 23). Three-quarters (74.5%) of Armenian-Americans have spoken with someone who has been to Armenia in the past five years. Nearly 8 in 10 (78.8%) would characterize their acquaintance's impression of Armenia as extremely or very favorable. Only 4.5% say it was not very or not at all favorable.

EXHIBIT 23. OVERALL IMPRESSION OF ARMENIA AS A TOURIST DESTINATION BY
ACQUAINTANCES OF ARMENIAN-AMERICANS



CHARACTERISTICS OF ARMENIA AS A TRAVEL DESTINATION

In general, target travelers and past visitors have a good familiarity with travel-related aspects of Armenia. The topics that yield the most uncertainty are in regard to the existing tourism infrastructure and whether Armenia is a place with all the creature comforts (Exhibit 24). Those Armenian-Americans who have never been to Armenia expectably have a more difficult time assessing conditions in Armenia. Aspects they feel particularly unprepared to assess are whether Armenia has good tourism infrastructure and whether it is a good value for the money.

EXHIBIT 24. ARMENIAN-AMERICANS HAVING “NO IDEA”
REGARDING DESTINATION CHARACTERISTICS OF ARMENIA

	All Armenian- Americans	Ever Been to Armenia	Recent Visitors	Never Been to Armenia	Target Travelers
Has good tourism infrastructure	25.0%	9.3%	9.3%	40.5%	10.6%
Overall, a good value for the money	18.7	2.6	2.8	34.4	7.1
A good place to travel with children	16.4	3.8	3.0	28.7	8.9
An affordable place to get to	16.4	5.8	4.6	26.7	6.0
An affordable place to travel once you are there	16.0	2.1	0.8	29.7	6.5
A place with all the creature comforts	15.3	6.4	7.5	23.9	8.9
A safe country in which to travel	11.5	3.0	2.1	19.9	6.4
An easy place to get to	10.8	0.8	0.3	20.5	3.5
Is scenically beautiful	9.3	2.6	2.1	15.8	5.5
There is much to see and do	6.7	0.1	0.0	13.2	0.3
Has excellent opportunities to explore my heritage	6.0	3.5	2.6	8.5	3.2
(Number of respondents)	(600)	(297)	(177)	(303)	(302)

More than 8 in 10 Armenian-Americans (84.7%) feel they have a good understanding of what Armenia is like as a tourist destination. Expectably, nearly all Armenian-Americans who have visited the country (95.7%) agree with this sentiment, but even 73.5% of those who haven't been there agree strongly or somewhat. Among target travelers, 92.6% agree strongly or somewhat with this sentiment.

The attitudes of many Armenian-Americans reflect an interest in the activities and beauty of the country but show hesitation at other aspects of traveling there. Most Armenian-Americans (82.6%) agree strongly that Armenia is scenically beautiful. Three-quarters (75.1%) agree strongly that it offers excellent opportunities to explore their heritage, and 71.6% agree that there is much to see and do there. Many (72.3%) agree strongly that Armenia is an affordable place to travel once there, and 67.4% agree strongly that it is, overall, a good value for the money (Exhibit 25).

However, ease of access to Armenia is one of its weaker perceived attributes as a destination. Only 33.2% of all Armenian-Americans agree strongly that Armenia is an easy place to get to. Getting to Armenia is often perceived to be more difficult than it actually is; only 18.0% of those who have not been to Armenia agree strongly that it is an easy place to get to, compared with 56.2% of those who have recently been there. Cost of traveling to Armenia is also a limitation; fewer than half (45.7%) of all Armenian-Americans agree strongly that it is an affordable place to get to.

EXHIBIT 25. ATTITUDES REGARDING ARMENIA AS A TRAVEL DESTINATION*
(AGREE STRONGLY)

	All Armenian- Americans	Ever Been to Armenia	Recent Visitors	Never Been to Armenia	Target Travelers
Is scenically beautiful	82.6%	93.0%	91.8%	70.7%	95.3%
Has excellent opportunities to explore my heritage	75.1	80.9	82.1	69.1	87.1
An affordable place to travel once you are there	72.3	84.1	81.2	56.2	79.4
There is much to see and do	71.6	84.8	84.4	56.7	88.2
Overall, a good value for the money	67.4	75.2	75.5	56.0	78.5
A good place to travel with children	60.3	82.3	86.8	31.2	79.4
A safe country in which to travel	53.0	67.2	75.3	36.1	68.6
Has good tourism infrastructure	50.0	62.1	64.4	31.9	59.5
An affordable place to get to	45.7	55.8	66.6	33.1	51.0
A place with all the creature comforts	41.1	56.0	56.9	23.1	54.5
An easy place to get to	33.2	45.6	56.2	18.0	42.9
(Number of respondents)	(450-569)	(269-297)	(161-177)	(180-297)	(275-301)

* Among Armenian-Americans with an opinion.

There are several other logistical aspects of traveling to Armenia that Armenian-Americans view much less positively. In addition to concerns about the ease and cost of traveling there, Armenian-Americans are skeptical about safety in Armenia, whether it is a good place to travel with children, and whether it has good tourism infrastructure and available amenities or creature comforts. These aspects are viewed least positively by Armenian-Americans who have never been to the country. Armenia's image as a tourism destination suffers with regard to safety, access, and tourism infrastructure, and these are the areas in which the dichotomy between visitors and non-visitors is greatest.

Among Armenian-Americans who have children under 18 living with them, 61.7% agree strongly that Armenia is a safe country in which to travel, and 65.0% agree strongly that it is a good place to travel with children.

On the whole, target travelers are much more likely than Armenian-Americans who have never visited Armenia to agree strongly with the aspects listed above. Compared with past visitors, target travelers agree more often that Armenia has excellent opportunities to explore their heritage and that there is much to see and do.

Armenian-Americans residing in California are more likely than those in the other four states to agree with all the statements about Armenia's characteristics as a destination. California Armenian-Americans are much more likely to agree that Armenia is affordable to get to, despite theirs being the most distant state. Californians are also twice as likely as other Armenian-Americans to say that Armenia is a good place to travel with children. Opinions of Armenian-Americans in New York are generally in line with those of Armenian-Americans in Massachusetts, Michigan, and New Jersey. However, New Yorkers are nearly as likely as Californians to agree strongly that Armenia is a safe country in which to travel, perhaps reflecting a tolerance built up by residents of large cities in these states.

OTHER CHARACTERISTICS OF ARMENIA

Several characteristics of Armenia are unfamiliar to many Armenian-Americans, particularly to those who have never visited. Armenian-Americans are most unlikely to have an opinion on Armenia's business environment, the presence of corruption, whether it is a good place to find a spouse or adopt a child, and whether the country is developing rapidly (Exhibit 26).

EXHIBIT 26. ARMENIAN-AMERICANS HAVING "NO IDEA"
REGARDING SELECTED CHARACTERISTICS OF ARMENIA

	All Armenian- Americans	Ever Been to Armenia	Recent Visitors	Never Been to Armenia	Target Travelers
Armenia has a favorable business environment	28.0%	14.5%	16.6%	41.3%	16.4%
Corruption is a problem	21.7	10.3	8.0	32.9	13.4
A good place to find a spouse or adopt a child	21.5	13.3	12.3	29.5	12.6
Armenia is developing rapidly	13.1	3.0	1.0	23.0	4.2
Armenia has been advertised effectively as a tourism destination	8.3	8.5	9.4	8.2	5.4
Armenians are trustworthy and honest	7.5	7.0	6.7	8.0	3.3
A good place to better acquaint myself with the Armenian church	5.0	5.3	8.6	4.7	3.9
Armenia has managed successfully to preserve its culture	3.9	0.5	0.3	7.3	0.7
I would consider moving to Armenia	3.8	4.1	4.2	3.6	2.0
A place I feel emotionally attached to	1.1	0.2	0.1	2.0	0.3
(Number of respondents)	(600)	(297)	(177)	(303)	(302)

Selected attitudes toward Armenia also reveal areas where the country's image is healthy and areas where it needs improvement (Exhibit 27). Again, it is evident that Armenian-Americans generally feel a connection to Armenia and view it positively in terms of culture and heritage. Seven in 10 (71.9%) agree strongly that Armenia has managed successfully to preserve its culture, and nearly as many (68.2%) agree strongly that it is a good place to better acquaint themselves with the Armenian Church. Six in 10 (60.4%) agree strongly that "Armenia is a place I feel emotionally attached to," though this sentiment is nearly twice as high among recent visitors as among non-visitors (82.4% versus 43.6%). High proportions of target travelers agree strongly with these cultural characteristics.

EXHIBIT 27. ATTITUDES REGARDING SELECTED CHARACTERISTICS OF ARMENIA*
(AGREE STRONGLY)

	All Armenian- Americans	Ever Been to Armenia	Recent Visitors	Never Been to Armenia	Target Travelers
Armenia has managed successfully to preserve its culture	71.9%	78.8%	77.4%	64.6%	84.5%
A good place to better acquaint myself with the Armenian Church	68.2	81.4	80.7	55.3	81.3
A place I feel emotionally attached to	60.4	77.3	82.4	43.6	80.0
Armenians are trustworthy and honest	56.7	58.9	60.4	54.6	61.9
Armenia is developing rapidly	51.7	57.2	70.3	44.9	61.2
A good place to find a spouse or adopt a child	43.4	53.5	53.9	31.2	51.8
Corruption is a problem	42.8	42.2	40.0	43.6	42.0
Armenia has a favorable business environment	31.0	32.3	38.1	29.1	36.2
Armenia has been advertised effectively as a tourism destination	28.2	40.0	41.7	16.6	38.6
I would consider moving to Armenia	8.0	11.8	16.7	4.2	14.1
(Number of respondents)	(432-593)	(254-296)	(148-177)	(178-297)	(261-301)

* Among Armenian-Americans with an opinion.

Among visitors and non-visitors alike, there is clearly less understanding of and less positive association with day-to-day operations of the country, specifically the presence of corruption, the business environment, and development of the country. Just over half (56.7%) agree strongly that Armenians are trustworthy and honest. Few agree strongly that they would consider moving to Armenia.

Furthermore, fewer than 3 in 10 Armenian-Americans (28.2%) agree strongly that Armenia has been advertised effectively as a tourism destination. Somewhat more target travelers and past visitors agree strongly with this. Californians are 2.7 times as likely as Armenian-Americans from the other four states to agree strongly.

TRAVEL INTERESTS

On a trip to Armenia, Armenian-Americans would most likely partake in general sightseeing (87.2%), visit monasteries or churches (83.6%), and experience Armenian music, literature, and dance (80.6%) (Exhibit 28). The idea of giving back to Armenia comes through relatively strongly again; over half of Armenian-Americans would be likely to do volunteer work during their visit.

Those born in Armenia are much more likely to visit friends or relatives and trace their roots, since these people would clearly have such connections in the country. Target travelers are much more likely than other Armenian-Americans to participate in all the selected activities. Not only are they highly likely to partake in general sightseeing activities, they are also keen to do less touristy activities, such as volunteer work, trace their roots, or take an educational course.

EXHIBIT 28. LIKELIHOOD OF PARTICIPATING IN SELECTED ACTIVITIES
ON A TRIP TO ARMENIA

	All Armenian- Americans	Born in Armenia	Ever Been to Armenia	Never Been to Armenia	Target Travelers
General sightseeing	87.2%	85.1%	85.5%	88.9%	90.7%
Visit monasteries or churches	83.6	89.7	82.9	84.3	87.6
Experience Armenian music, literature, or dance	80.6	89.4	79.4	81.7	89.2
Visit friends or relatives	56.7	96.8	83.6	30.2	76.5
Do volunteer work	52.9	55.6	56.1	49.8	65.5
Trace your roots	48.0	64.9	51.0	45.0	57.6
Attend cultural exchange programs or events	45.8	55.5	49.2	42.4	54.4
Take an educational course	32.8	42.6	38.2	27.4	43.9
Take part in active sports or recreation	31.2	38.4	33.2	29.3	38.6
Get a health treatment or therapeutic spa treatment	27.3	47.7	37.3	17.5	40.0
Do paid work	24.9	31.6	31.1	18.8	36.7
Purchase property	24.4	40.6	37.9	11.1	40.6
(Number of respondents)	(599)	(162)	(297)	(302)	(302)

Armenian-Americans' choice of activities while on a trip to Armenia vary somewhat by state of residence. Armenian-Americans in all five states are about equally likely to want to partake in

sightseeing, trace their roots, visit churches and monasteries, attend cultural exchange programs or events, and experience Armenian music, literature, or dance. However, Californians are much more likely to visit friends or relatives on a trip to Armenia, possibly reflecting the fact that they were more often born in Armenia and are likely to have more friends and relatives to visit there. Californians are also more likely to purchase property, get a health or spa treatment, do volunteer or paid work, and, along with Armenian-Americans from Michigan, take an educational course on a trip to Armenia.

BARRIERS TO VISITATION

A variety of reasons limit first-time and repeat visitation to Armenia. Lack of time is a big obstacle for many Armenian-Americans who have never visited Armenia (69.5%), particularly among target travelers (78.3%) (Exhibit 29). Cost is the second most common reason cited by those who have not visited. Non-visitors generally feel they will like Armenia; only 15.9% of Armenian-Americans who have not been there cite that they are afraid they will not like the country, while the figure is half that (8.3%) among target travelers who have not previously been there. This figure is lowest among those who were born in Armenia.

The distance to Armenia and the fact that there are too many other places to visit are cited as barriers by past visitors more often by than non-visitors. Time constraints and cost of traveling are also barriers among past visitors.

EXHIBIT 29. REASONS FOR NOT HAVING VISITED/NOT TAKING MORE TRIPS TO ARMENIA
(EXTREMELY OR SOMEWHAT IMPORTANT)

	Armenian-Americans Who Have Visited Armenia			Armenian-Americans Who Have Never Visited Armenia	
	All	Recent Visitors	Target Travelers	All	Target Travelers
There are too many other places to visit	65.4%	65.7%	65.4%	55.0%	46.3%
Do not have the time to do so	58.8	64.0	63.4	69.5	78.3
Cannot afford to do so	48.5	44.7	52.9	58.9	67.5
Armenia is too far to travel	47.5	48.8	50.6	39.0	34.3
Immigration issues or formalities	19.8	22.2	23.3	17.1	15.1
Did not like Armenia on a previous visit/Afraid would not like Armenia	6.9	8.9	7.1	15.9	8.3
(Number of respondents)	(260-272)	(169-177)	(177-186)	(287-301)	(96-100)

V. TRAVEL INFORMATION AND PLANNING

PLANNING LEAD TIME

Armenian-Americans have a relatively short planning lead time. Most Armenian-Americans (70.1%) would arrange a trip to Armenia one to six months in advance of their departure (Exhibit 30). Understandably, those who have previously been to Armenia are more likely to arrange their trip closer to the time of departure. Target travelers, in part because many of them have previously been to Armenia, are also slightly more likely than all Armenian-Americans to arrange their trip closer to their departure.

EXHIBIT 30. PLANNING LEAD TIME

	All Armenian- Americans	Ever Been to Armenia	Recent Visitors	Never Been to Armenia	Target Travelers
Less than 1 month	10.8%	15.6%	13.9%	6.1%	11.2%
1 to 3 months	34.5	43.8	45.3	25.2	37.1
4 to 6 months	35.6	26.2	28.2	45.0	37.7
7 months to 1 year	11.3	9.1	8.0	13.5	8.7
More than 1 year	7.7	5.3	4.5	10.2	5.4
(Number of respondents)	(574)	(287)	(173)	(286)	(297)

Californians are slightly more likely than other Armenian-Americans to leave their planning to the final month; 12.1% are last-minute planners (Exhibit 31), compared with 7.4% of other Armenian-Americans. Armenian-Americans from Massachusetts and Michigan have the longest planning lead times.

EXHIBIT 31. PLANNING LEAD TIME—BY STATE

	California	Massachusetts	Michigan	New Jersey	New York
Less than 1 month	12.1%	5.5%	6.1%	9.7%	8.2%
1 to 3 months	35.3	27.3	34.2	38.9	31.8
4 to 6 months	33.6	43.6	39.5	35.4	44.5
7 months to 1 year	10.3	15.5	14.9	13.3	12.7
More than 1 year	8.6	8.2	5.3	2.7	2.7
(Number of respondents)	(116)	(110)	(114)	(113)	(110)

MAKING TRAVEL ARRANGEMENTS

Nearly half (48.3%) of all Armenian-Americans say they would make their own travel arrangements for a trip to Armenia (Exhibit 32). One-quarter and one-fifth would use a U.S. or Armenian tour operator, respectively. Those who have been to Armenia and target travelers are somewhat more likely to make their own arrangements. Very few would prefer to have friends or relatives in Armenia make travel arrangements for them.

EXHIBIT 32. TRAVEL ARRANGEMENT PREFERENCE

	All Armenian- Americans	Ever Been to Armenia	Recent Visitors	Never Been to Armenia	Target Travelers
Make own arrangements	48.3%	54.2%	60.1%	41.9%	51.6%
U.S. tour operator	25.3	16.3	12.1	35.2	19.0
Armenian tour operator	20.0	20.1	22.8	19.8	23.8
Friends or relatives living in Armenia	6.3	9.3	5.0	3.1	5.5
(Number of respondents)	(526)	(275)	(168)	(251)	(271)

INFLUENCING FACTORS

When deciding whether or not to visit Armenia, Armenian-Americans first consult people they know and trust—specifically, their friends or acquaintances, relatives, or church community or association. Given Armenian-Americans' penchant for making their own travel arrangements, it is not surprising that so few of them would consult a travel agent or tour operator (Exhibit 33).

Those who have never been to Armenia are the most likely to rely on the recommendations of someone who has been to Armenia previously. Target travelers and previous visitors to Armenia are most likely to rely on recommendations of friends or relatives living in Armenia. Magazine articles and television programs are the least influential of the factors listed in Exhibit 33.

EXHIBIT 33. INFLUENCING FACTORS IN DECIDING WHETHER OR NOT TO VISIT ARMENIA
(EXTREMELY LIKELY)

	All Armenian- Americans	Ever Been to Armenia	Recent Visitors	Never Been to Armenia	Target Travelers
Recommendations of people who have been there	59.5%	47.1%	43.7%	71.9%	63.8%
Recommendations of friends or relatives living there	51.7	64.0	62.8	38.0	65.6
Recommendations from church community or association	47.1	39.1	34.7	54.7	53.5
Recommendations of a travel agent or tour operator	35.0	39.7	36.4	30.4	43.1
A travel guidebook	31.7	32.7	29.9	30.7	37.0
Information obtained on the Internet	28.4	26.0	21.2	30.8	32.8
A magazine article or television program	19.9	20.0	17.1	19.8	28.3
(Number of respondents)	(560-592)	(283-295)	(168-176)	(266-296)	(292-301)

MEDIA

Most Armenian-Americans have some familiarity with news of Armenia. Nearly three-quarters (74.1%) say they are at least somewhat familiar with news of Armenia; only 33.9%, however, are extremely or very familiar with news of Armenia (Exhibit 34). As might be expected, previous travelers to Armenia and target travelers tend to be more familiar with news of Armenia than other Armenian-Americans.

EXHIBIT 34. FAMILIARITY WITH NEWS OF ARMENIA

	All Armenian- Americans	Ever Been to Armenia	Recent Visitors	Never Been to Armenia	Target Travelers
Extremely familiar	14.7%	23.2%	25.8%	6.5%	19.2%
Very familiar	19.2	27.4	34.1	11.3	24.2
Somewhat familiar	40.2	38.9	32.9	41.5	41.7
Not very familiar	19.0	8.8	5.0	28.7	13.3
Not at all familiar	7.0	1.7	2.1	12.0	1.7
(Number of respondents)	(591)	(289)	(173)	(302)	(298)

Californians are somewhat more familiar than other Armenian-Americans with news of Armenia. More than one-third (36.4%) of California Armenian-Americans say they are extremely or very familiar, compared with 30.5% in New Jersey, 29.1% in New York, 24.2% in Michigan, and 23.3% in Massachusetts.

NEWSPAPERS

Only 27.3% of Armenian-Americans can name a U.S.-based Armenian newspaper that they read on a regular basis. *Asbarez Armenian Daily* is the most commonly cited newspaper; 16.6% of all Armenian-Americans regularly read this paper, and nearly a third (32.0%) of recent visitors read it (Exhibit 35). *Nor Gyank Weekly* and *Hairenik Weekly* follow, although their readership is at much lower levels than that of *Asbarez Armenian Daily*. Past visitors to Armenia and target travelers are much more likely to read a paper on a regular basis—36.9% and 38.7%, respectively, named at least one newspaper that they read regularly.

EXHIBIT 35. READERSHIP OF SELECTED ARMENIAN NEWSPAPERS

	All Armenian- Americans	Ever Been to Armenia	Recent Visitors	Never Been to Armenia	Target Travelers
Asbarez Armenian Daily	16.6%	23.7%	32.0%	9.7%	25.1%
Nor Gyank Weekly	4.4	7.4	7.4	1.4	7.3
Hairenik Weekly	3.2	4.0	4.0	2.5	5.9
Nor Or Weekly	2.0	2.8	2.3	1.3	4.0
New Armenian Daily	1.3	1.4	2.3	1.3	2.7
Hayrenik/Kamarak Weekly	1.0	1.9	2.8	0.2	1.9
Angakhoutioun	0.9	1.8	2.5	0.1	1.7
Hye Sharzhoom Student Newspaper	0.8	0.3	0.4	1.3	0.3
Navasart Monthly	0.7	1.4	0.2	0.0	1.4
New Hye Weekly	0.7	1.4	2.3	0.0	1.4
Barev Weekly	0.1	0.1	0.2	0.1	0.2
Massis Weekly	0.1	0.2	0.2	0.0	0.1
Mother Church	0.1	0.2	0.2	0.0	0.1
Kaghapar Weekly	<0.1	0.1	0.2	0.0	0.1
Kardsik	<0.1	0.1	0.2	0.0	0.1
Nor Seroond	<0.1	0.1	0.2	0.0	0.1
Papasian Laura	<0.1	0.1	0.2	0.0	0.1
Parev Monthly	<0.1	0.1	0.2	0.0	0.1
Paros Bi-Weekly	<0.1	0.1	0.2	0.0	0.1
Vozni	<0.1	0.1	0.2	0.0	0.1
Other*	5.8	6.0	2.7	5.5	7.3
(Number of respondents)	(569)	(281)	(169)	(287)	(285)

* The other newspapers mentioned by respondents are included in Appendix B.

Californians are five times as likely as other Armenian-Americans to regularly read *Asbarez Armenian Daily* (21.2% versus 3.9%) and more than twice as likely to regularly read *Nor Gyank Weekly* (5.3% versus 2.0%). Massachusetts Armenian-Americans are more than twice as likely as other Armenian-Americans to read *Hairenik Weekly* (7.6% versus 3.1%).

MAGAZINES

Just over a third (35.3%) of all Armenian-Americans can cite an Armenian magazine that they read on a regular basis. *AGBU News Magazine*, published by the Armenian General Benevolent Union, is by far the most commonly read magazine (Exhibit 36). With only a fifth of the share, *Armenian Reporter* and *Armenian Mirror-Spectator* follow, being cited by 3.7% and 3.2%, respectively. Unlike newspapers, the top-mentioned magazines do well among Armenian-Americans who have never been to Armenia.

EXHIBIT 36. READERSHIP OF SELECTED ARMENIAN MAGAZINES*

	All Armenian- Americans	Ever Been to Armenia	Recent Visitors	Never Been to Armenia	Target Travelers
AGBU News Magazine	17.5%	13.8%	14.1%	21.0%	16.1%
Armenian Reporter	3.7	3.6	2.9	3.9	5.0
Armenian Mirror-Spectator	3.2	2.0	2.3	4.2	4.6
Armenian Observer	2.2	4.5	5.1	0.1	1.6
Shrjapat Art Magazine	2.0	4.1	4.6	0.0	2.7
Armenian Weekly	1.6	2.4	3.1	0.9	2.1
Armenian Life	1.5	1.7	2.5	1.3	2.9
Kach Nazar	1.4	2.9	2.3	0.0	2.8
Hamaynapatker	1.3	2.7	2.3	0.0	2.7
Nor Gyank Outreach	0.8	0.1	0.2	1.5	1.6
Armenian Church Quarterly	0.8	0.1	0.0	1.5	0.2
Hai Gyank	0.8	0.2	0.2	1.3	1.4
Avangard	0.7	1.5	0.2	0.0	1.5
California Courier Hoosharar Monthly	0.7	0.1	0.2	1.3	0.1
Ararat Hyelights	0.7	1.4	0.0	0.0	0.0
Massis	0.7	0.0	0.0	1.3	1.3
Zvartnots	0.7	1.4	2.3	0.0	1.3
Ararat	0.3	0.6	1.0	0.0	0.1
Hoosharar Monthly, AGBU	0.3	0.2	0.3	0.3	0.2
AMAA News	0.2	0.3	0.2	0.1	0.4
Annual of the Society for the Study of Caucasia	<0.1	0.0	0.0	0.1	0.1
Armenian Forum	<0.1	0.0	0.0	0.1	0.1
Hromgla	<0.1	0.1	0.0	0.0	0.1
Visions of Elegance	<0.1	0.0	0.0	0.1	0.0
Other [†]	4.8	7.6	7.9	2.0	6.4
(Number of respondents)	(553)	(272)	(161)	(281)	(278)

* The magazines in the table were mentioned by at least one respondent. An additional 29 magazines were included in the questionnaire but were not named by any respondents.

[†] The other magazines mentioned by respondents but not listed in the questionnaire are included in Appendix B.

RADIO

Only 5.9% of Armenian-Americans can name a U.S.-based Armenian radio station or program that they regularly listen to. While no particular program or station captures a large share of Armenian-American listeners, Armenian Radio Hour programs—radio programs offered independently in most major markets—are most commonly cited (Exhibit 37).

EXHIBIT 37. RADIO STATIONS ARMENIAN-AMERICANS REGULARLY LISTEN TO*

	All Armenian- Americans	Ever Been to Armenia	Recent Visitors	Never Been to Armenia	Target Travelers
Armenian Radio Hour programs	1.7%	1.8%	1.4%	1.5%	2.4%
Armenian Radio Hour [various]	1.2	1.2	1.3	1.2	2.0
Hamazkayin Armenian Radio Hour	0.1	0.1	0.0	0.0	0.0
Outreach Radio Hour	0.1	0.0	0.0	0.2	0.2
Armenian Independent Radio Hour	<0.1	0.1	0.1	0.0	0.0
Armenian-American Radio Hour	0.2	0.3	0.0	0.2	0.3
Spuirk Armenian Radio Hour	<0.1	0.1	0.0	0.0	0.0
Ararat Amateur Net	0.1	0.1	0.2	0.0	0.1
Armenianradio.com	0.9	1.6	2.7	0.2	1.5
Armenian Cultural Hour	0.2	0.4	0.6	0.1	0.2
Armenian Independent Broadcasting	0.7	0.1	0.2	1.3	0.1
Armenian Radio	0.1	0.1	0.2	0.2	0.3
Hyevibes.com	<0.1	0.1	0.2	0.0	0.1
Other [†]	2.3	4.0	5.6	0.6	3.9
(Number of respondents)	(557)	(277)	(167)	(280)	(279)

* The radio stations in the table were mentioned by at least one respondent. An additional four radio stations were included in the questionnaire but were not named by any respondents.

[†] The other radio stations or programs mentioned by respondents but not listed in the questionnaire are included in Appendix B.

TELEVISION

Television is a strong medium, particularly in California. More than a third (36.9%) of all Armenian-Americans—who are heavily concentrated in California—watch at least one of the three Armenian TV stations that we asked about. Horizon Armenian TV is regularly watched by more than a quarter (27.3%) of all Armenian-Americans and nearly half (48.1%) of recent visitors (Exhibit 38). Television viewership is even higher among past visitors to Armenia and target travelers.

EXHIBIT 38. TV STATIONS ARMENIAN-AMERICANS REGULARLY WATCH

	All Armenian- Americans	Ever Been to Armenia	Recent Visitors	Never Been to Armenia	Target Travelers
Horizon Armenian TV	27.3%	42.1%	48.1%	12.8%	37.9%
Armenia TV	17.0	29.0	26.1	5.3	30.7
Armenia's H1 Network	12.0	21.2	19.6	2.9	19.7
None of these	63.1	42.7	42.8	82.9	43.3
(Number of respondents)	(584)	(289)	(173)	(296)	(296)

Californians are by far the most inclined to watch one or more of the three stations addressed in the survey; 47.0% say they do so regularly, compared with only 8.6% of other Armenian-Americans. Indeed, 35.0% of Armenian-Americans who reside in California regularly watch Horizon Armenian TV, 22.2% regularly watch Armenia TV, and 15.4% regularly watch Armenia's H1 Network (both via satellite from Armenia). Fewer than 1 in 14 Armenian-Americans in each of the other states regularly watch these stations (Exhibit 39).

EXHIBIT 39. TV STATIONS ARMENIAN-AMERICANS REGULARLY WATCH—BY STATE

	California	Massachusetts	Michigan	New Jersey	New York
Horizon Armenian TV	35.0%	3.5%	5.1%	5.2%	6.8%
Armenia TV	22.2	0.0	1.7	6.0	1.7
Armenia's H1 Network	15.4	1.7	1.7	2.6	2.5
None of these	53.0	95.7	93.2	87.1	89.8
(Number of respondents)	(117)	(115)	(118)	(116)	(118)

Given the high penetration of Armenian television among target travelers and the limited number of channels, TV might be an effective means of reaching these Armenian-Americans, particularly those in California. Additionally, ad rates are reasonable. For example, ad rates on Horizon are quite low compared with mainstream network TV and make an extremely cost-effective advertising tool.⁵

THE INTERNET

Eight in 10 (79.2%) of all Armenian-Americans and 84.0% of target travelers have access to the Internet. Slightly more than a fifth (22.1%) of Armenian-Americans with Internet access can name at least one Armenia-related website that they access at least once a month. ArmeniaNow is cited most commonly and is particularly popular among past visitors and target travelers

⁵ Ad rates on Horizon Armenian TV can be as low as US\$35 per spot for a prime time placement.

(Exhibit 40). Past visitors to Armenia and target travelers are much more likely to use an Armenia-related website regularly.

EXHIBIT 40. ARMENIA-RELATED WEBSITES USED AT LEAST ONCE A MONTH
(AMONG ARMENIAN-AMERICANS WITH INTERNET ACCESS)

	All Armenian- Americans	Ever Been to Armenia	Recent Visitors	Never Been to Armenia	Target Travelers
ArmeniaNow	6.6%	11.5%	8.3%	1.1%	10.7%
Groong	4.9	8.8	11.2	0.5	5.9
Cilicia	4.8	8.4	5.7	0.6	7.3
Armeniapedia.org	4.4	8.2	5.7	0.1	6.9
Armeniachurch.org	4.1	5.6	3.8	2.4	5.1
Armeniadiaspora.com	3.2	5.4	5.6	0.7	3.8
Armenianchurchwd.org	2.7	3.9	3.6	1.3	2.9
Armenianprelacy.org	2.3	4.0	3.9	0.3	2.3
Diaspora.am	2.1	3.4	2.6	0.5	2.1
Armeniandiaspora.com	2.0	3.7	2.8	0.2	2.1
Other*	8.7	13.6	15.5	3.2	11.7
(Number of respondents)	(440)	(234)	(141)	(206)	(228)

* The other websites mentioned by respondents are included in Appendix B.

ARMENIAN ASSOCIATIONS

Only one in five Armenian-Americans (19.8%) say that they belong to an Armenian association or organization. Moreover, no single association counts more than 1 in 20 Armenian-Americans as members. The most popular Armenian association is the Armenian General Benevolent Union (AGBU); 4.9% are members (Exhibit 41). Target travelers are the most likely to belong to an Armenian association or organization, but only marginally so. Among those who mentioned other organizations, the most prominent mentions were church organizations.

EXHIBIT 41. MEMBERSHIP IN SELECTED ARMENIAN ASSOCIATIONS

	All Armenian- Americans	Ever Been to Armenia	Recent Visitors	Never Been to Armenia	Target Travelers
Armenian General Benevolent Union (AGBU)	4.9%	6.2%	6.7%	3.6%	5.1%
Armenian Assembly of America	2.8	3.4	5.0	2.1	4.7
Armenian Students Association	2.3	3.0	0.2	1.6	4.3
Armenian National Committee of America	2.0	3.3	2.9	0.7	0.9
Dashnakcutiun	0.9	1.6	2.2	0.2	1.6
Ramkavarner	0.7	1.3	2.2	0.1	1.3
Armenian Engineers and Scientists of America	0.1	0.1	0.1	0.2	0.0
Hntchakian	0.1	0.0	0.0	0.2	0.2
Other*	10.3	9.3	8.0	11.4	12.1
None of these	80.2	78.8	80.4	81.5	76.9
(Number of respondents)	(581)	(291)	(172)	(290)	(296)

* The other organizations mentioned by respondents are included in Appendix B.

Most Armenian-Americans attend Armenian community functions at least occasionally; 58.3% do so (Exhibit 42). Nearly a quarter (22.3%) do so often. Recent visitors to Armenia and target travelers are the most likely to attend community functions; 74.0% and 67.0%, respectively, do so.

EXHIBIT 42. HOW OFTEN ARMENIAN-AMERICANS ATTEND ARMENIAN COMMUNITY FUNCTIONS

	All Armenian- Americans	Ever Been to Armenia	Recent Visitors	Never Been to Armenia	Target Travelers
Almost every week	5.0%	6.8%	4.0%	3.3%	8.7%
Frequently	17.3	20.8	24.6	13.8	22.0
Occasionally	36.0	35.1	45.4	37.0	36.3
Rarely or never	41.6	37.2	26.0	46.0	33.0
(Number of respondents)	(585)	(292)	(176)	(293)	(300)

THE ARMENIAN CHURCH

Most Armenian-Americans (64.0%) attend the Armenian Church at least occasionally (Exhibit 43); one-third (33.9%) attend often. Past visitors to Armenia and target travelers are the most likely to attend the Armenian Church. For example, 77.2% of target travelers do so at least occasionally,

and 41.2% do so often. Given the importance of the Armenian Church to Armenian-Americans, we would recommend including it as a prominent component of the marketing mix.

EXHIBIT 43. HOW OFTEN ARMENIAN-AMERICANS ATTEND THE ARMENIAN CHURCH

	All Armenian- Americans	Ever Been to Armenia	Recent Visitors	Never Been to Armenia	Target Travelers
Almost every week	16.2%	19.7%	22.0%	12.7%	20.7%
Frequently	17.7	22.0	19.7	13.4	20.5
Occasionally	30.1	35.0	41.0	25.2	36.0
Rarely or never	36.0	23.3	17.3	48.7	22.9
(Number of respondents)	(588)	(295)	(175)	(293)	(300)

VI. OBSERVATIONS

The outlook for Armenia is promising. Many Armenian-Americans have already been to Armenia; 3 in 10 have been in the past five years. Moreover, Armenian-Americans express a high level of interest in visiting or revisiting Armenia, and many intend to do so in the next five years.

We believe that Armenian-Americans who express a high level of interest in visiting Armenia and intend to visit the country in the next five years are CAPS's best prospects within the Armenian-American community. We refer to them as Armenia's target travelers.

Most target travelers say they would visit Armenia in the spring or summer months and stay more than two weeks; 3 in 10 would take a trip that is longer than four weeks. They are highly motivated to see their ancestral homeland, contribute to the development of Armenia, and explore their ancestral heritage; half would conduct business or explore business opportunities. On a trip to Armenia, target travelers also say they would be likely to partake in general sightseeing; experience Armenian music, literature, or dance; and visit monasteries or churches. More than half would visit friends or relatives, do volunteer work, trace their roots, or attend cultural exchange programs or events.

Fewer think that Armenia is an easy or affordable place to get to, but most say that it is an affordable place in which to travel once you are there and think that, overall, Armenia offers good value for the money. Few, however, believe that Armenia has been advertised effectively as a tourist destination.

Target travelers, like the Armenian-American community as a whole, are highly concentrated in California. As such, we recommend that CAPS's main marketing focus be on the Golden State. In particular, CAPS should focus on the cities in California where large concentrations of Armenian-Americans reside—most importantly, Los Angeles (including Little Armenia) and Glendale. Others include Burbank, Fresno, Montebello, North Hollywood, Pasadena, the San Francisco Bay Area, and Van Nuys.

To reach Armenian-Americans, we recommend using newspaper advertising and editorial coverage. Additionally, and to the extent that CAPS's budget allows, we also recommend television advertising, particularly in California. One-quarter of target travelers regularly read the *Asbarez Armenian Daily*, and four in nine California target travelers regularly watch Horizon Armenian TV. Magazine readership, however, is very fragmented; only *AGBU News* magazine is regularly read by more than 1 in 10 target travelers. Few Armenian-Americans regularly listen to Armenian radio.

Most target travelers have Internet access, and we believe that, despite the low use of the websites included in the questionnaire, the Internet can play an important role in marketing Armenia to Armenian-Americans and getting tourism information in the hands of target travelers.

We believe that the Armenian Church and related associations will also be a good vehicle to get the message across. Most Armenian-Americans attend the Armenian Church; target travelers do so more than other Armenian-Americans.

APPENDIX A

ARMENIAN TRAVEL QUESTIONNAIRE

Hello, this is _____ from Menlo Consulting Group, an independent marketing research company. We are conducting a survey in association with the Armenian Tourism Development Agency. I would like to ask you a few questions about travel and your thoughts on Armenia. Your answers will be kept strictly confidential.

S1. Are you of Armenian descent?

Yes (**Skip to QU. 1**) ☐ No (**CONTINUE**) ☐

S2. Is there anyone else in the household who is of Armenian descent and who is over the age of 18?

Yes (**ASK TO SPEAK WITH THAT PERSON**) ☐

No (**TERMINATE**) ☐

INTERNATIONAL TRAVEL EXPERIENCE

1. How many **INTERNATIONAL** trips have you taken for leisure or to visit friends or relatives in the past five years? Again, I would like you to count only **INTERNATIONAL** trips for leisure or to visit relatives taken in the past five years. (**X ONE BOX ONLY**)

None (**SKIP TO QU. 3**) ☐

One or more (**WRITE IN**) _____

2. Which of the following places did you visit for leisure or to visit friends or relatives in the past five years? (**READ LIST**) (**X ALL THAT APPLY**)

Canada <input type="checkbox"/>	Central or South America <input type="checkbox"/>	Africa <input type="checkbox"/>
The Caribbean <input type="checkbox"/>	Europe <input type="checkbox"/>	Asia <input type="checkbox"/>
Mexico <input type="checkbox"/>	The Middle East and Caucasus <input type="checkbox"/>	The South Pacific (including Australia and New Zealand) <input type="checkbox"/>

TRAVEL TO ARMENIA

3. Have you ever been to Armenia?

Yes (**CONTINUE**) ☐ No (**SKIP TO QU. 14**) ☐

4. How many trips have you taken to Armenia in the past five years? (**X ONE BOX ONLY**)

None (**SKIP TO QU. 14**) ☐

One or more (**WRITE IN**) _____ (**IF RANGE PROVIDED, PLEASE CLARIFY**)

5. Did you visit Armenia for business in the past five years?

Yes ☐ No ☐

6. Did you visit Armenia to visit friends or relatives in the past five years?

Yes ☐ No ☐

7. Did you visit Armenia for leisure in the past five years?

Yes..... ☐ No ☐

(IF ANSWER TO QU. 5, 6, AND 7 ARE ALL “NO”, THEN SKIP TO QU. 14)

(IF ANSWER TO QU. 5 IS “YES” AND QU. 6, AND 7 ARE BOTH “NO”, THEN SKIP TO QU. 14)

8. Now thinking only about trips you took for leisure or to visit friends or relatives, in what year did you begin your most recent trip to Armenia?

(WRITE IN 4 DIGIT YEAR) _ _ _ _

9. In which month did you begin this trip? **(X ONE BOX ONLY)**

January ☐ April.....☐ July☐ October.....☐
February ☐ May☐ August☐ November.....☐
March.....☐ June.....☐ September.....☐ December.....☐

10. How many nights were you away from home on this trip? **(DO NOT READ LIST) (X ONE BOX ONLY)**

1 to 7 nights ☐ 15 to 21 nights ☐ 29 nights or more..... ☐
8 to 14 nights ☐ 22 to 28 nights ☐

11. Where did you stay on this trip? **(READ LIST) (X ALL THAT APPLY)**

Hotel ☐ B&B or guest house..... ☐ With relatives..... ☐
Rented apartment..... ☐ Hostel..... ☐
Your own property ☐ With friends..... ☐

12. What was your overall impression of Armenia as a tourist destination? Was it extremely favorable, very favorable, somewhat favorable, not very favorable, or not at all favorable? **(X ONE BOX ONLY)**

Extremely favorable ☐
Very favorable..... ☐
Somewhat favorable ☐
Not very favorable..... ☐
Not at all favorable..... ☐

13. And, would you say it was pretty much as you expected, better than you expected, or worse than expected? **(X ONE BOX ONLY)**

Pretty much as expected ☐
Better than expected..... ☐
Worse than expected..... ☐

14. Have you spoken with anyone who has been to Armenia recently; that is, in the past five years?

Yes **(CONTINUE)** ☐ No **(SKIP TO QU. 16)** ☐

15. How would you characterize their impression of Armenia as a tourist destination? Would you say extremely favorable, very favorable, somewhat favorable, not very favorable, or not at all favorable? **(X ONE BOX ONLY)**

Extremely favorable ☐
 Very favorable..... ☐
 Somewhat favorable ☐
 Not very favorable..... ☐
 Not at all favorable..... ☐

INTEREST AND AWARENESS IN ARMENIA

16. How important would each of the following be in motivating you to visit or revisit Armenia? Would you say extremely important, somewhat important, or not important? **(X ONE BOX FOR EACH STATEMENT)**

	<u>Extremely Important</u>	<u>Somewhat Important</u>	<u>Not Important</u>
To see your ancestral homeland	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
To explore your ancestral heritage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
To visit friends or relatives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
To conduct business or explore business opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
To contribute to the development of Armenia	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

17. How much would you like to visit or revisit Armenia? Would you say extremely, very much, somewhat, not very much, or at not at all? **(X ONE BOX ONLY)**

Extremely ☐
 Very much..... ☐
 Somewhat..... ☐
 Not very much ☐
 Not at all ☐
 Don't know ☐ **(DO NOT READ)**

18. **(ASK IF QU. 3 = NO)** How important is each of the following reasons for not having visited Armenia? Would you say extremely important, somewhat important, or not important? **(X ONE BOX PER LINE)**

	<u>Extremely Important</u>	<u>Somewhat Important</u>	<u>Not Important</u>
You have not had the time to do so	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
You cannot afford to do so	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
There are too many other places you want to visit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Armenia is too far to travel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
You are afraid you would not like Armenia	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Immigration issues or formalities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

19. **(ASK IF QU. 3 = YES)** How important is each of the following reasons for not taking more trips to Armenia? Would you say extremely important, somewhat important, or not important?
(X ONE BOX PER LINE)

	<u>Extremely Important</u>	<u>Somewhat Important</u>	<u>Not Important</u>
You do not have the time to do so	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
You cannot afford to do so	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
There are too many other places you want to visit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Armenia is too far to travel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
You did not like Armenia on a previous visit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Immigration issues or formalities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

20. If you were to visit Armenia, which of the following would you be likely to do? **(READ LIST) (X ALL THAT APPLY)**

- General sightseeing.....☐
 Trace your roots.....☐
 Visit monasteries or churches☐
 Experience Armenian music, literature, or dance.....☐
 Take part in active sports or recreation☐
 Take an educational course☐
 Do volunteer work.....☐
 Do paid work.....☐
 Visit friends or relatives.....☐
 Purchase property☐
 Attend cultural exchange programs or events.....☐
 Get a health treatment or therapeutic spa treatment.....☐

21. On a trip to Armenia, would you prefer to make travel arrangements through a U.S. tour operator, through an Armenian tour operator, through friends or relatives living in Armenia, or make your own arrangements? **(X ONE BOX ONLY)**

- U.S. tour operator☐
 Armenian tour operator.....☐
 Friends or relatives living in Armenia.....☐
 Make own arrangements☐

22. If you were to visit Armenia, about how long do you think you would go for? **(X ONE BOX ONLY)**

- 1 to 7 nights☐ 15 to 21 nights☐ 29 nights or more.....☐
 8 to 14 nights☐ 22 to 28 nights☐

23. And, would you go in the spring, summer, fall, or winter? **(X ONE BOX ONLY)**

- Spring☐ Summer☐ Fall☐ Winter☐

24. On a trip to Armenia, in which of the following types of accommodation do you think you would stay? **(READ LIST) (X ALL THAT APPLY)**

- Hotel☐ B&B or guest house.....☐ With relatives☐
 Rented Apartment.....☐ Hostel.....☐
 Own property☐ With friends.....☐

25. I am now going to read you a series of statements. Please tell me to what extent you agree with each statement about Armenia? Do you agree strongly, agree somewhat, disagree somewhat, or disagree strongly? **(X ONE BOX FOR EACH STATEMENT)**

	<u>Agree Strongly</u>	<u>Agree Somewhat</u>	<u>Disagree Somewhat</u>	<u>Disagree Strongly</u>	<u>Have No Idea</u>
I feel I have a good understanding of what Armenia is like as a tourist destination	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
An easy place to get to	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A safe country in which to travel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A good place to travel with children	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
There is much to see and do there	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Has excellent opportunities to explore my heritage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
An affordable place to get to	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
An affordable place to travel once you are there	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A place with all the creature comforts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Has good tourism infrastructure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Is scenically beautiful	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overall, a good value for the money	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

26. And, to what extent do you agree with each of the following statements about Armenia? Do you agree strongly, agree somewhat, disagree somewhat, or disagree strongly? **(X ONE BOX FOR EACH STATEMENT)**

	<u>Agree Strongly</u>	<u>Agree Somewhat</u>	<u>Disagree Somewhat</u>	<u>Disagree Strongly</u>	<u>Have No Idea</u>
Armenia is developing rapidly	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Corruption is a problem	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A place I feel emotionally attached to	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Armenia has managed successfully to preserve its culture	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Armenians are trustworthy and honest	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Armenia has a favorable business environment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A good place to find a spouse or adopt a child	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I would consider moving to Armenia	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A good place to better acquaint myself with the Armenian Church	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Armenia has been advertised effectively as a tourism destination	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

27. When, if ever, are you likely to take a trip to Armenia? Would you say in the next two years, in the next 3 to 5 years, more than 5 years from now, or never? **(X ONE BOX ONLY)**

In the next 2 years ☐
 In the next 3 to 5 years ☐
 More than 5 years from now ☐
 Never ☐

TRIP PLANNING

Now I would like to ask you a few questions about your trip planning behavior.

28. If you were to visit Armenia, how far in advance of departure do you think you would arrange your trip? **(READ LIST) (X ONE BOX ONLY)**

Less than 1 month ☐
 1 to 3 months ☐
 4 to 6 months ☐
 7 months to 1 year ☐
 More than 1 year ☐

29. In deciding whether or not to visit Armenia, how likely would you be to rely on each of the following? Would you say extremely likely, somewhat likely, or not likely? **(X ONE BOX PER LINE)**

	<u>Extremely Likely</u>	<u>Somewhat Likely</u>	<u>Not Likely</u>
Recommendations of people who have been there	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Recommendations of a travel agent or tour operator	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Information obtained on the Internet	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Recommendations from church community or an association that you belong to	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A magazine article or television program	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Recommendations of friends or relatives living there	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A travel guidebook	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

30. How familiar would you say you are regarding news of Armenia? **(READ LIST) (X ONE BOX ONLY)**

Extremely familiar ☐
 Very familiar ☐
 Somewhat familiar ☐
 Not very familiar ☐
 Not at all familiar ☐

31. Which U.S. based Armenian newspapers do you regularly read? **(DO NOT READ LIST) (PROMPT TWICE) (X ALL THAT APPLY) (ASK RESPONDENT TO SPELL IF NECESSARY)**

- | | | | |
|---------------------------------------|--------------------------|------------------------------|--------------------------|
| Angakhoutioun..... | <input type="checkbox"/> | New Armenian Daily..... | <input type="checkbox"/> |
| Asbarez Armenian Daily | <input type="checkbox"/> | New Hye Weekly | <input type="checkbox"/> |
| Barev Weekly..... | <input type="checkbox"/> | Nor Seroond | <input type="checkbox"/> |
| Hairenik Weekly | <input type="checkbox"/> | Nor Gyank Weekly | <input type="checkbox"/> |
| Hayrenik/Kamarak Weekly | <input type="checkbox"/> | Nor Or Weekly..... | <input type="checkbox"/> |
| Hye Sharzhoom Student Newspaper | <input type="checkbox"/> | Papasian Laura | <input type="checkbox"/> |
| Kaghapar Weekly | <input type="checkbox"/> | Parev Monthly | <input type="checkbox"/> |
| Kardsik | <input type="checkbox"/> | Paros Bi-Weekly..... | <input type="checkbox"/> |
| Massis Weekly..... | <input type="checkbox"/> | Vozni | <input type="checkbox"/> |
| Mother Church | <input type="checkbox"/> | Other (please specify) | <input type="checkbox"/> |
| Navasart Monthly..... | <input type="checkbox"/> | None of these | <input type="checkbox"/> |

32. Which U.S. based Armenian magazines do you regularly read? **(DO NOT READ LIST) (PROMPT TWICE) (X ALL THAT APPLY) (ASK RESPONDENT TO SPELL IF NECESSARY)**

- | | | | |
|---|--------------------------|---|--------------------------|
| AGBU News Magazine..... | <input type="checkbox"/> | Hoosharar Monthly, A.G.B.U. | <input type="checkbox"/> |
| AMAA News..... | <input type="checkbox"/> | Hromgla..... | <input type="checkbox"/> |
| Annual of the Society for the Study of
Caucasia..... | <input type="checkbox"/> | Hye Booj Health Qrt..... | <input type="checkbox"/> |
| Ararat..... | <input type="checkbox"/> | Journal of Armenian Studies, NAASR | <input type="checkbox"/> |
| Ararat Hyelights | <input type="checkbox"/> | Journal of the Society for Armenian Studies... | <input type="checkbox"/> |
| Armenia Today | <input type="checkbox"/> | Kach Nazar | <input type="checkbox"/> |
| Armenian Church Quarterly..... | <input type="checkbox"/> | Krikorian Doug Press Telgram La
Newstand | <input type="checkbox"/> |
| Armenian Forum | <input type="checkbox"/> | Louys Periodical..... | <input type="checkbox"/> |
| Armenian Life..... | <input type="checkbox"/> | Massis | <input type="checkbox"/> |
| Armenian Linguistics..... | <input type="checkbox"/> | Nor Gyank Outreach | <input type="checkbox"/> |
| Armenian Mirror-Spectator | <input type="checkbox"/> | Outreach | <input type="checkbox"/> |
| Armenian Numismatic Journal..... | <input type="checkbox"/> | Shrjapat Art Magazine | <input type="checkbox"/> |
| Armenian Observer..... | <input type="checkbox"/> | TransCaucasus: A Chronology..... | <input type="checkbox"/> |
| Armenian Reporter | <input type="checkbox"/> | Uptown..... | <input type="checkbox"/> |
| Armenian Review..... | <input type="checkbox"/> | Verelk..... | <input type="checkbox"/> |
| Armenian Sentinel | <input type="checkbox"/> | Visions of Elegance | <input type="checkbox"/> |
| Armenian Weekly..... | <input type="checkbox"/> | Voice | <input type="checkbox"/> |
| ArmenOrama | <input type="checkbox"/> | Window View of the Armenian Church | <input type="checkbox"/> |
| Avangard | <input type="checkbox"/> | Yerevan Magazine | <input type="checkbox"/> |
| Baika Monthly | <input type="checkbox"/> | Yeritasard Hayastan | <input type="checkbox"/> |
| Bats Namak (Open Letter Inc.)..... | <input type="checkbox"/> | Yerkoonk..... | <input type="checkbox"/> |
| Business Life Magazine..... | <input type="checkbox"/> | Yezerk Armenian Press Digest..... | <input type="checkbox"/> |
| California Courier Hoosharar Monthly .. | <input type="checkbox"/> | Zrutsaser..... | <input type="checkbox"/> |
| California Victory..... | <input type="checkbox"/> | Zvartnots | <input type="checkbox"/> |
| Eritasard Hayastan | <input type="checkbox"/> | Other (please specify)..... | <input type="checkbox"/> |
| Hai Gyank | <input type="checkbox"/> | None of these..... | <input type="checkbox"/> |
| Hamaynapatker | <input type="checkbox"/> | | |
| Hars International Wedding | <input type="checkbox"/> | | |
| Hayastanyaitz Yegeghetzy | <input type="checkbox"/> | | |

33. Which U.S. based Armenian radio stations or programs do you regularly listen to? **(DO NOT READ) (PROMPT TWICE) (X ALL THAT APPLY) (ASK RESPONDENT TO SPELL IF NECESSARY)**

- | | | | |
|---|--------------------------|---|--------------------------|
| AL's Radio | <input type="checkbox"/> | Armenian Radio Hour..... | <input type="checkbox"/> |
| Ararat Amateur Net..... | <input type="checkbox"/> | Hamazkayin Armenian Radio Hour..... | <input type="checkbox"/> |
| Ararat Net Western North America..... | <input type="checkbox"/> | Hie Tele-Radio | <input type="checkbox"/> |
| ArmenianRadio.com | <input type="checkbox"/> | Hyevibes.com..... | <input type="checkbox"/> |
| Armenian-American Radio Hour..... | <input type="checkbox"/> | Outreach Radio Hour | <input type="checkbox"/> |
| Armenian Cultural Hour | <input type="checkbox"/> | Spuirk Armenian radio Hour..... | <input type="checkbox"/> |
| Armenian Independent Broadcasting | <input type="checkbox"/> | Voice of American Armenian Service..... | <input type="checkbox"/> |
| Armenian Independent Radio Hour | <input type="checkbox"/> | Other (please specify) | <input type="checkbox"/> |
| Armenian Radio | <input type="checkbox"/> | None of these | <input type="checkbox"/> |

34. Which of the following Armenian TV stations do you regularly watch? **(READ LIST) (X ALL THAT APPLY)**

- Horizon Armenian TV (via satellite)..... ☐
- Armenia TV (via DishNetwork)
 ☐ |

Armenia's H1 Program (via satellite from Armenia)
 ☐ |

35. Do you have access to the Internet?

- Yes **(Continue)**..... ☐ No **(SKIP TO QU. 37)**..... ☐

36. Which of the following Armenia-related websites do you use at least once a month? **(READ LIST) (X ALL THAT APPLY)**

- | | | | |
|----------------------------|--------------------------|------------------------------|--------------------------|
| Armenianchurchwd.com | <input type="checkbox"/> | Armenianprelacy.org | <input type="checkbox"/> |
| Armeniachurch.org | <input type="checkbox"/> | Cilicia..... | <input type="checkbox"/> |
| Armeniadiaspora.com..... | <input type="checkbox"/> | Diaspora.am | <input type="checkbox"/> |
| Armeniandiaspora.com..... | <input type="checkbox"/> | Groong | <input type="checkbox"/> |
| ArmeniaNow | <input type="checkbox"/> | Other (please specify) | <input type="checkbox"/> |
| Armeniapedia.org | <input type="checkbox"/> | None of these | <input type="checkbox"/> |

ABOUT YOURSELF

Now I would like to ask you a few questions about yourself. Remember all answers will be kept strictly confidential.

37. Which of the following best describes your age?

- | | | | |
|----------------|--------------------------|------------------|--------------------------|
| 18 to 34 | <input type="checkbox"/> | 55 to 64 | <input type="checkbox"/> |
| 35 to 44 | <input type="checkbox"/> | 65 to 74 | <input type="checkbox"/> |
| 45 to 54 | <input type="checkbox"/> | 75 or older..... | <input type="checkbox"/> |

RECORD GENDER (DO NOT ASK).

- Male
 ☐ | Female | ☐ |

38. Do any children under age 18 live with you?

Yes..... ☐ No ☐

39. What is the highest level of formal education you have completed? **(CHECK ONE BOX ONLY)**

High school or less ☐ Attended graduate school.... ☐
 1 to 3 years of college ☐ Completed master's degree ☐
 Graduated college ☐ Completed doctorate ☐

40. Do you currently have a valid passport?

Yes..... ☐ No ☐

41. In what state do you live? **(SELECT FROM DROP DOWN LIST)**

INCLUDE A DROP-DOWN MENU OF THE 50 STATES AND WASHINGTON, D.C. PLEASE HAVE CALIFORNIA, MASSACHUSETTS, NEW YORK, NEW JERSEY, AND MICHIGAN AT THE TOP AND THE OTHERS BELOW

42. Which of the following languages do you speak? **(READ LIST) (CHECK ALL THAT APPLY)**

Western Armenian ☐
 Eastern Armenian ☐
 Russian ☐
 None of these ☐

43. In which country were you born? **(X ONE BOX ONLY)**

Armenia ☐
 France..... ☐
 Iran..... ☐
 Lebanon..... ☐
 Russia..... ☐
 Turkey..... ☐
 United States ☐ (SKIP TO QU. 45)
 Other (please specify) _____

44. In which year, did you immigrate to the United States? **(WRITE IN 4 DIGIT YEAR)** _ _ _ _

45. Were either of your parents born in Armenia?

Yes..... ☐ No ☐

46. Were any of your grandparents born in Armenia?

Yes..... ☐ No ☐

47. Are you a member of any of the following Armenia associations or organizations? **(READ LIST) (X ALL THAT APPLY)**

- | | | | |
|--|--------------------------|------------------------------|--------------------------|
| Armenian Students Association | <input type="checkbox"/> | Dashnakcutiun | <input type="checkbox"/> |
| Armenian Assembly of America | <input type="checkbox"/> | Hntchakian | <input type="checkbox"/> |
| Armenian Engineers & Scientists of America | <input type="checkbox"/> | Ramkavarner..... | <input type="checkbox"/> |
| Armenian General Benevolent Union (AGBU) | <input type="checkbox"/> | Other (please specify) | <input type="checkbox"/> |
| Armenian National Committee of America | <input type="checkbox"/> | None of these | <input type="checkbox"/> |

48. About how often do you attend the Armenia church? Would you say almost every week, frequently, occasionally, or rarely or never? **(X ONE BOX ONLY),**

- Almost every week..... ☐
- Frequently..... ☐
- Occasionally
- Rarely or never

49. About how often do you attend Armenian community functions? Would you say almost every week, frequently, occasionally, or rarely or never? **(X ONE BOX ONLY),**

- Almost every week..... ☐
- Frequently..... ☐
- Occasionally
- Rarely or never

Those are all the questions that I have today. Thank you for you time.

APPENDIX B

VERBATIM RESPONSES

EXHIBIT 1. OTHER VERBATIM NEWSPAPER RESPONSES [QUESTION 31]

ABAKA	Dajar
AECPSITE	H Magazine
AIM Armenian Newspaper	HEBU
ALIK	Horizon (2)
AMAN Armenian Missionary Journal	I A.M.A. News
BAKAR	Kachar
California Courier (2)	Montreal
Catholic Church Newspaper	Saint Stepanos Church Newspaper
Church Newspapers (2)	Yuravon

EXHIBIT 2. OTHER VERBATIM MAGAZINE RESPONSES [QUESTION 32]

AIM (6)	Ashkgyoorg
ANC	Church magazines (3)
Armenia USA	Church newsletter
Armenian Assembly	Horizon (2)
Around The World	Through the Internet

EXHIBIT 3. OTHER VERBATIM RADIO STATION OR PROGRAM RESPONSES
[QUESTION 33]

89.5 WSOU	Radiovom
Ardzagang	Rockford University station
Armenian Nights	Sigh Hall University radio station
Armradio.am	Some music channel available 24/7
Comes every Sunday	SOU
East coast Sunday afternoon program	WMHT
Horizon	WRIS
New Jersey radio hour	WSOU South Orange New Jersey
Public Tele	

EXHIBIT 4. OTHER VERBATIM WEB SITE RESPONSES [QUESTION 36]

AGBU	Havorsk, Something like that
ANAC	High Radio Hye Radio
ANC AYF	Humiscam.org
ANCA.COM (4)	Hye Etch
ARAMAC	Hyejokes.com
Armenia NANC	Jeneside Education Websites
Armenia News Center	Just Google it
Armenia.com (2)	Littlearmenian.com
Armenian Nights.com (2)	Narek.com
Armenian Old City	New Armenians
Armenianchurch.net	Norhayer.de
Armenianhouse.org	Panarmenia
Armenianinfo.am	Reuters
Armeniansingles.com	Saint Marys
Armeniantvhorizon.com	SAR
ARNC or NCNA, Don't Recall	Some of the churches have their own, Armenian
ARS	Cathedral
church related	WSOU Sunday Afternoon
Daughters of Our Time	www.gbemirdjian.com
Hamovphotoe.com	Yerevannights.com (2)

EXHIBIT 5. OTHER VERBATIM RESPONSES OF ARMENIA ASSOCIATIONS
OR ORGANIZATIONS [QUESTION 47]

AEYS	Daughters Of Barton
AMAA	Dioceses
AMCA	Enian Fraternity
ARARAT	Holy Cross Church
ARM	Home Minit Men
Armenia Association Of GCC	Homenetmen
Armenia Club at University	Hontenen
Armenia Culture Association	IRICK
Armenian Missionary	Just The Church
Armenian Bar Association	Knights And Daughters of Vartan
Armenian Church	Knights of Vartan
Armenian Church of America	Ladies Guild At Church
Armenian Missionary Association	Mid Hudson Armenian Club
Armenian Relief Society (4)	NASA
Armenian Revolutionary Federation	Night of Parton
Armenian Society of Los Angeles	SANA
ASA	Shushi
AYF	St Johns Armenia Church
AYF ANC	Tcheritable
AYS	XXX Armenian Fraternity
AYS	XXX Fraternity
Capital Trex	Yerazert
Church (4)	Youth Organization
Church Groups	